



-1-

PATENT

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In re Patent Application of

James Peterson et al.

Application No.: 09/654,627

Filed: September 5, 2000

For: SYSTEM AND METHOD FOR TAX
SENSITIVE PORTFOLIO
OPTIMIZATION

Confirmation No.: 7348

Group Art Unit: 3624

Examiner: Ella Colbert

SUBMISSION OF ISSUE FEE

Russ Building
 235 Montgomery Street, 30th Floor
 San Francisco, CA 94104
 (415) 954-4497

M/S ISSUE FEE
 Commissioner for Patents
 P.O. Box 1450
 Alexandria, VA 22313-1450

Sir:

Per the Notice of Allowance and Issue Fee Due which was mailed October 11, 2005, enclosed for filing in the above-captioned case are form PTOL-85b and a authorization to charge deposit account number 50-2001 for the required fees.

In addition in connection with the PTOL-85b form enclosed, it should be noted that the current correspondence address in the upper left hand portion of the form has been modified to show the most current correspondence address for the above case according to the USPTO records. On October 31, 2005 the USPTO mailed a Notice of Acceptance of Power of Attorney indicating that the current address for correspondence in this matter is: Farella Braun + Martel LLP, Attn: Brian Keating, 235 Montgomery Street, 30th Floor, San Francisco, CA 94104. Further, on Dec. 8, 2005 the undersigned spoke with a USPTO employee (Kermit) in the USPTO EBC department who indicated that the current correspondence address had been updated in the USPTO records, and we have entered this updated correspondence address in the attached form.

The Commissioner is hereby authorized to charge any deficiency in the fees filed, asserted to be filed or which should have been filed herewith (or with any paper hereafter filed in

CERTIFICATE OF TRANSMITTAL
 I hereby certify that this fee transmittal is being transmitted via facsimile to the USPTO fax no. (571) 273-2885 on the date noted below.

Date: 12/8/2005 By: 
 Mianne Marangio

Atty Docket No.: SCHB-2700
 20190\856976.1

12/08/05 FAX 415 954 4400

FB&M 22nd FLOOR

002



PATENT

-2-

this application by this firm) to our Deposit Account No. 50-2001, under Order No. SCHB-2700.

A duplicate copy of PTOL-85b is enclosed.

Respectfully submitted,

Farella Braun + Martel LLP

Date: 12 - 8 - 05

By: BK KM

Brian J. Keating
Reg. No. 39,520

Attorneys for Applicant(s)

Atty Docket No.: SCHB-2700
20190\856976.1